

Utah State University

DigitalCommons@USU

---

Library Faculty & Staff Presentations

Libraries

---

5-20-2021

## Homeward Bound: How to Move an Entire Cataloging Unit to Remote Work

Andrea Payant  
*Utah State University*

Becky Skeen  
*Utah State University*

Follow this and additional works at: [https://digitalcommons.usu.edu/lib\\_present](https://digitalcommons.usu.edu/lib_present)



Part of the [Library and Information Science Commons](#)

---

### Recommended Citation

Payant, A., Skeen, B. (2021) Homeward Bound: How to Move an Entire Cataloging Unit to Remote Work. Presented at the Utah Library Association (ULA) Conference, May 20, 2021, Online.

This Presentation is brought to you for free and open access by the Libraries at DigitalCommons@USU. It has been accepted for inclusion in Library Faculty & Staff Presentations by an authorized administrator of DigitalCommons@USU. For more information, please contact [digitalcommons@usu.edu](mailto:digitalcommons@usu.edu).



Andrea Payant

Metadata Librarian

[andrea.payant@usu.edu](mailto:andrea.payant@usu.edu)

Becky Skeen

Special Collections Cataloging Librarian

[becky.skeen@usu.edu](mailto:becky.skeen@usu.edu)



# Homeward Bound

How to Move an Entire Cataloging Unit to Remote Work

ULA Conference  
May 20, 2021



# Outline

---

01

Background & Timeline

02

Phases of Remote Work

03

Lessons Learned





**Background**

# Background

---



- Early 2019:
  - USU's Cataloging & Metadata Services Unit Head approved for a sabbatical in 2020
  - Asked Andrea and I if we would be willing to be Temporary Co-Heads for the six month's she was on sabbatical



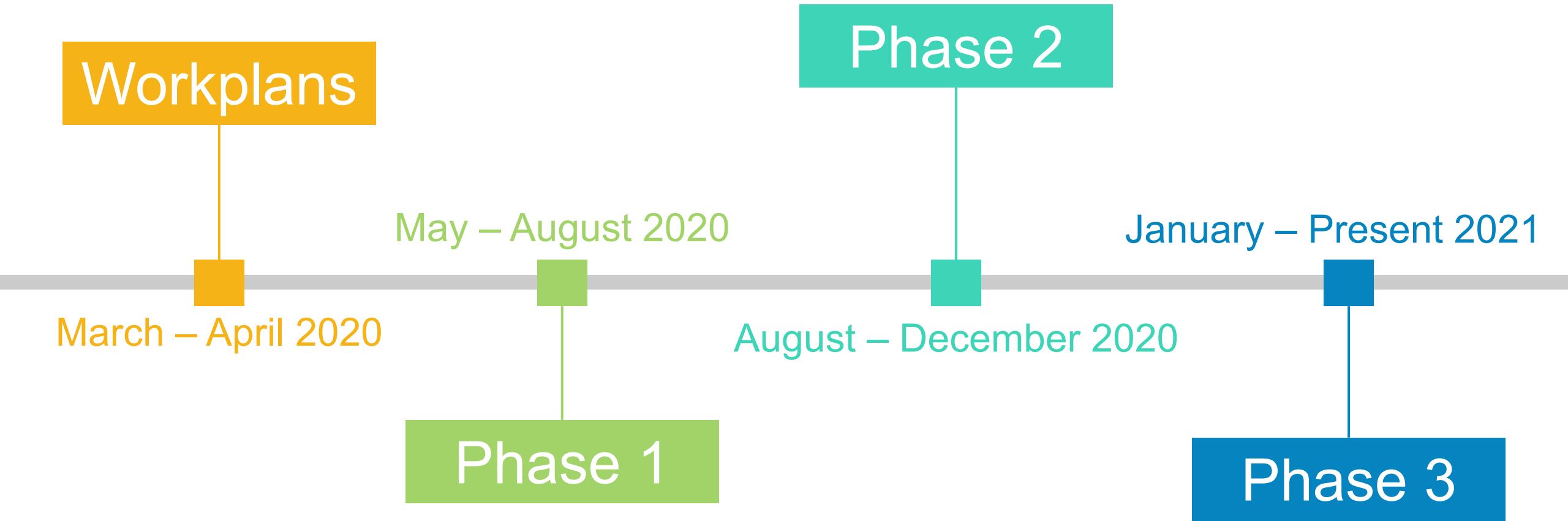
- Mid 2019 – Early 2020:
  - Planning, divvying up duties, transferring administrative powers
  - Finishing up certain administrative duties before the regular unit head started her sabbatical (e.g. Annual workplans and evals)



- February 24, 2020 – August 24, 2020:
  - We are temporary co-unit heads



# COVID-19 Remote Work Timeline





# Phase 1

May – August 2020



# Phase 1 – Red Level, 100% remote

---



- Individual workplans
  - Modified for remote work



- Remote work responsibilities
  - Coding project, digital collection metadata, professional development, transcription, EAD guide remediation, and ArchivesSpace ingest



- Purchase on Demand Cataloging
  - Airtable Form (May-July 2020)
    - Filled out by Collection Management Staff
    - Populated a spreadsheet used information to catalog the item
  - Collections Management and Resource Sharing Unit (CMRS) decided this was unsustainable





# Phase 1 – Red Level, 100% remote

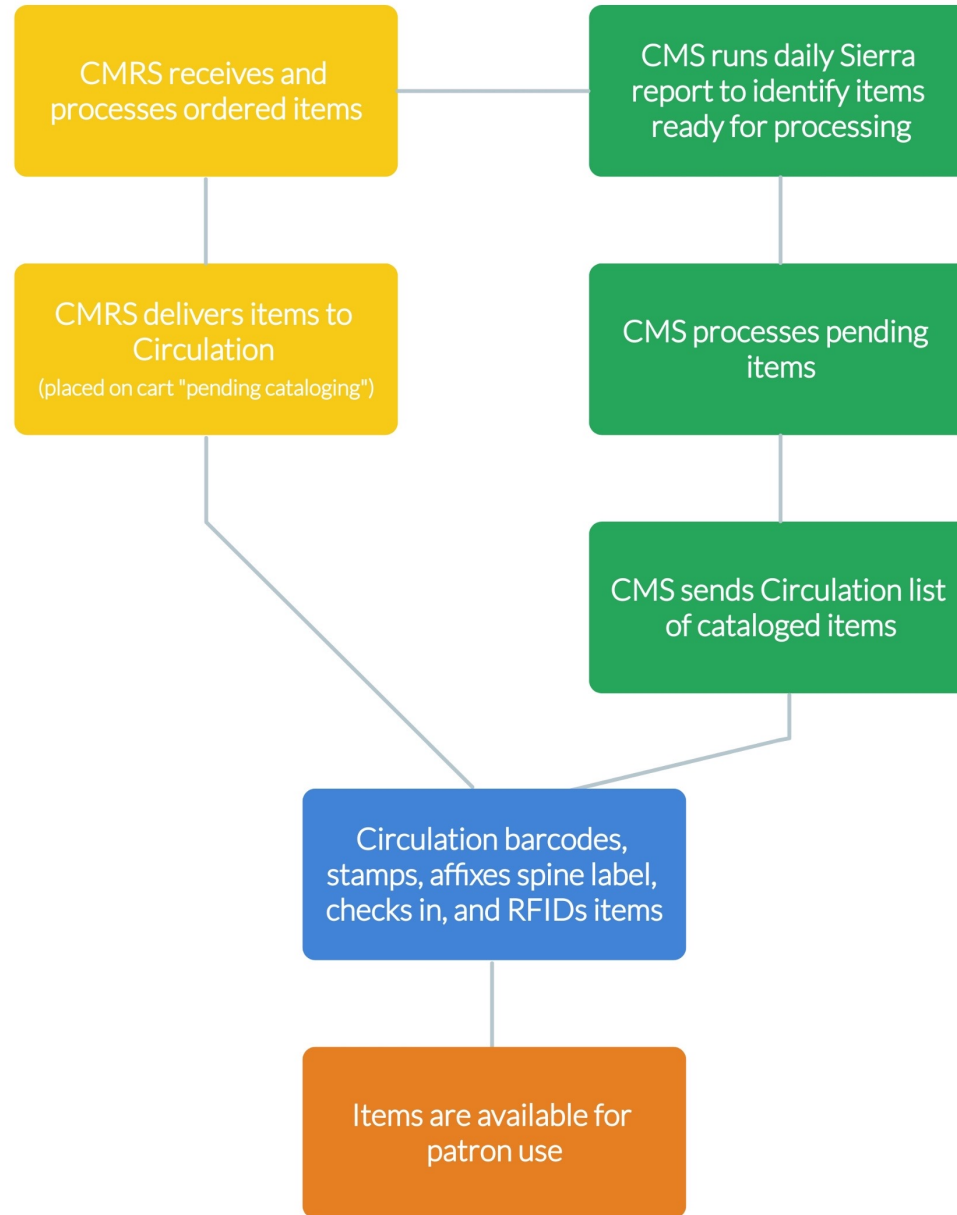
---



- Remote Cataloging Workflow (Planned out but not implemented before phase 2 – will be implemented if needed)

- ISBNs in ILS order records
  - Enough info to catalog most materials remotely
  - Sustainable, permanent workflow modification
- ILS reports to identify new acquisitions
  - Cataloged remotely - email identifying cataloged items
  - CMRS to Circulation for physical processing and check-in

## Remote Cataloging Workflow





# Phase 2

August – December 2020



# Phase 2 – Orange Level, 75% remote

---

## In-Library responsibilities



- Quarantine system (internal, at least 24-hours)
  - Drop-off forms
    - Indicate date/time dropped off in CMS and from CMS to Circulation



- Weekly shifts (some catalogers & student workers)
  - Shared online calendar (TeamUp)
  - Primary responsibility
    - Item tracking
    - Catalog time sensitive items (rush = POD, DDA, Hold)



## Phase 2 – Orange Level, 75% remote

---



### - Airtable Tracking

- Added information to assist with remote cataloging (complex cataloging)
  - ISBN
  - Publisher
  - Publication Year
  - Publication Location
  - Pagination, Illustrations? and height
  - Optional: photographs of items (e.g., title page, title page verso)
- Complex items assigned to at-home cataloger, placed on holding shelf and processed later



# Phase 2 – Orange Level, 75% remote

---

## Remote work responsibilities

- Cataloging assigned items, batch processes
- Digital collection metadata (includes remediation)
- ArchivesSpace
- Scholarship and professional contributions



# Phase 3

January – Present 2021



## Phase 3 – Yellow Level, less than 75% remote



- Improved quarantine system (internal, 24-hour)
  - Drop-off forms with rotating quarantine carts
    - AM and PM responsibilities



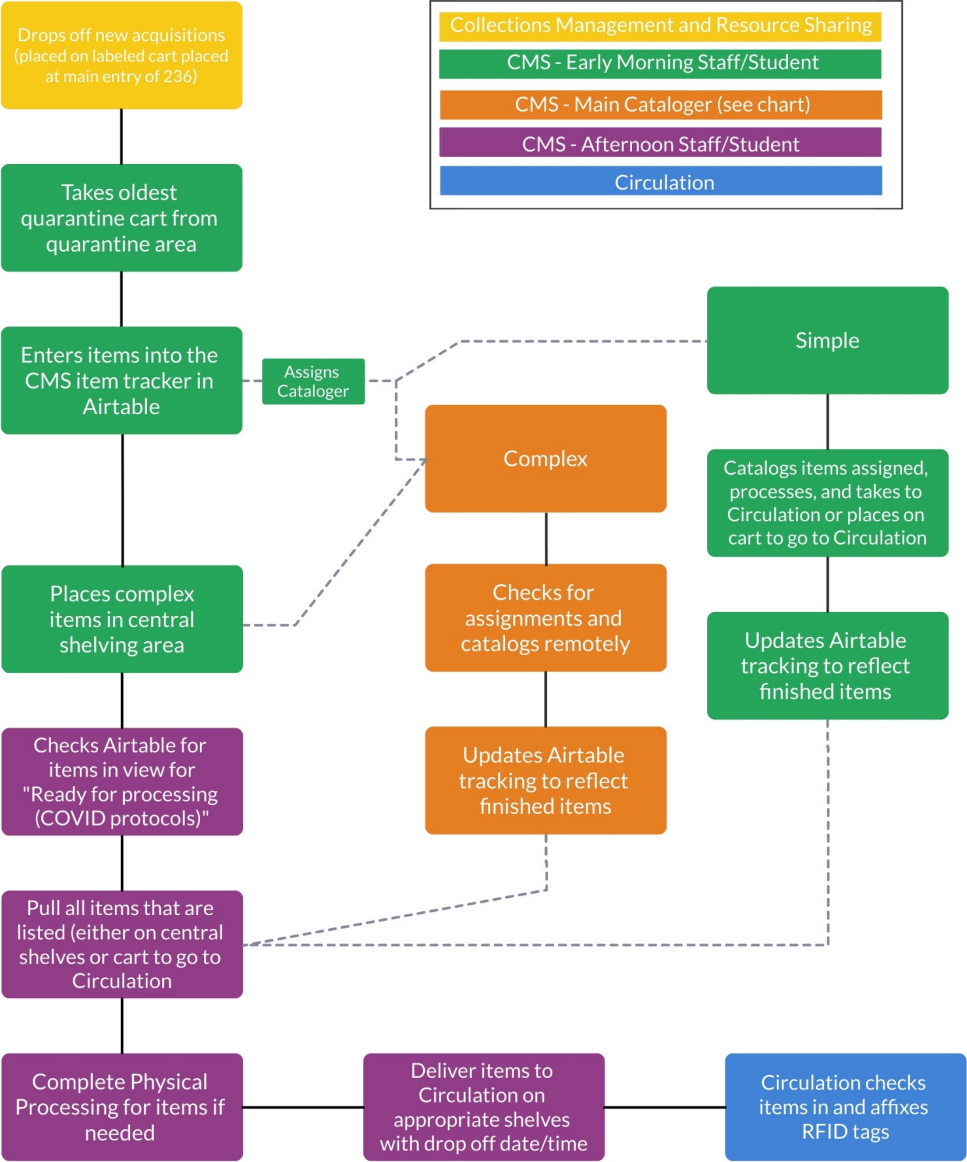
- Increased shifts (more catalogers & student workers)
  - Primary responsibilities
    - Time sensitive items (rush = POD, DDA, Hold)
    - Other items



- Continued Airtable tracking and use of holding shelves, other remote projects



# Hybrid Remote/In-Person Cataloging Workflow





# **Lessons Learned**



# Lessons Learned

---



## - Communication

- Frequent updates and transparency
- Multiple methods more effective (Email, Slack, Zoom)
- Extra care, consideration, sensitivity



## - Health and Wellness

- Social hours (optional)
- Fun Slack channels
- Administration
  - 2.5 hours health and wellness time per week



# Lessons Learned

---



## Flexible workflows

- Can re-implement at any level, if needed

Thank You!

Questions?



# Fully Editable Icon Sets: A

You can Resize without  
losing quality

You can Change Fill  
Color &  
Line Color

**FREE  
PPT  
TEMPLATES**

[www.allppt.com](http://www.allppt.com)



# Fully Editable Icon Sets: B

You can Resize without  
losing quality

You can Change Fill  
Color &  
Line Color

**FREE  
PPT  
TEMPLATES**

[www.allppt.com](http://www.allppt.com)



# Fully Editable Icon Sets: C

You can Resize without  
losing quality

You can Change Fill  
Color &  
Line Color

**FREE  
PPT  
TEMPLATES**

[www.allppt.com](http://www.allppt.com)

